



# Guide to Using Endnote Software

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# Workshop Objectives

- **AT the end of this 2-hr workshop participants will be able to perform the following tasks using Endnote x7 software:**
  - Create a library
  - Create groups
  - Perform online search
  - Enter citations manually
  - Retrieve citations fulltext
  - Cite while writing
  - Import References to Endnote library
  - Change the format of citations using commonly used style
  - Share Reference Library



# Bibliographic Software

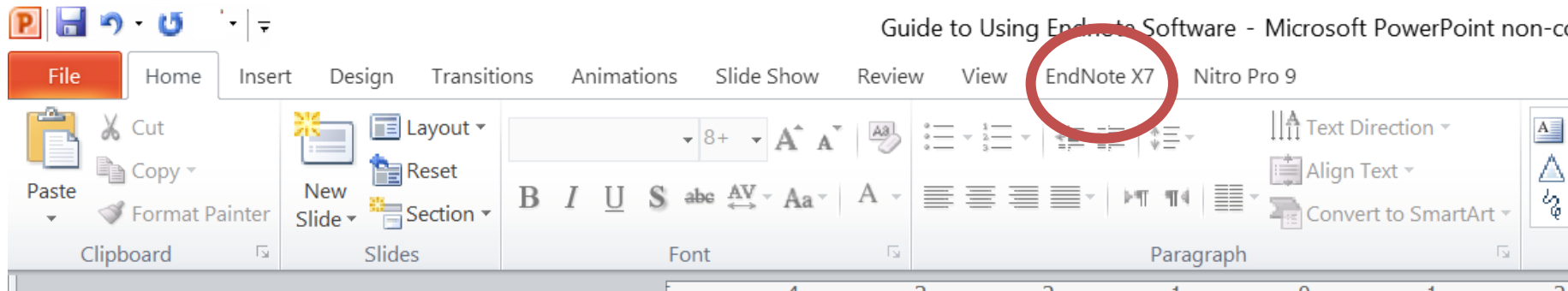
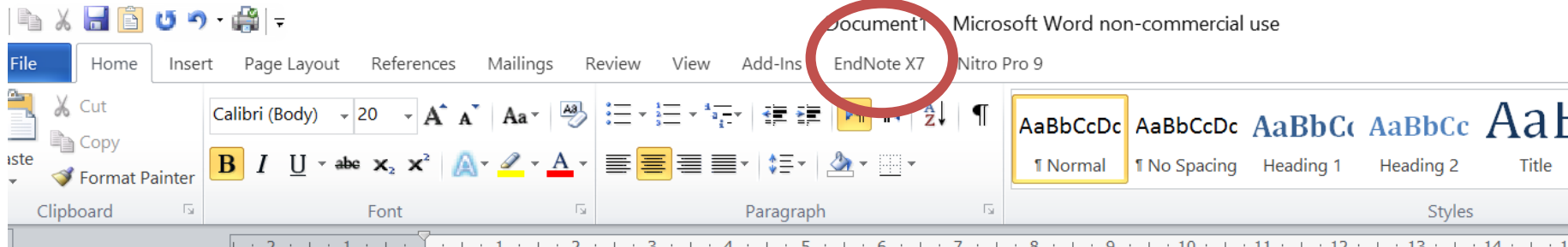
- Assist in building bibliographic databases
- Import and manage bibliographic database
- Format citations that matches most bibliographic styles
- Cite while you write
- Download and store citations full-text
- Share library



# Example of Bibliographic Software

• Endnote	Thomson Reuters	\$\$\$
• Zotero	George Mason U	Free
• RefWorks	ProQuest	\$\$\$
• Mendely	Elsevier	Free
• JabRef	JabRef developers	Free







# Interface

EndNote X7 - [TOC project]

File Edit References Groups Tools Window Help

Numbered

Search Options Search Whole Library Match Case Match Words

Author Contains

And Year Contains

And Title Contains

My Library

- All References (272)
- Unfiled (84)
- Trash (4)
- TOC Introduction (188)
  - Introduction
- Find Full Text

Recor...	Year	Author	Title	Ab
380	Oct...	Carol Fan...	Interventions and measurement tools related to	
11	2016	Wooldri...	Refractory primary medication nonadherence: Prevalence and predictors after pharmacist counseling at ho...	Su
644	2016	Valverd...	[Medication reconciliation: From admission to primary care]	OE
52	2016	Truesda...	The Health Effects of Income Inequality: Averages and Disparities	Mi
674	2016	Polinski...	An Insurer's Care Transition Program Emphasizes Medication Reconciliation, Reduces Readmissions And Costs	Ad
53	2016	Moore, ...	Patterns of Drug Use and Drug-related Hospital Admissions in HIV-Positive and -Negative Gay and Bisexual ...	Wi
1	2016	Kansag...	So many options, where do we start? An overview of the care transitions literature	BA
368	2016	Entezari...	A systematic review on comparing 2 common models for management of warfarin therapy; pharmacist-led s...	De
12	2016	Bell, S. P...	Effect of Pharmacist Counseling Intervention on Health Care Utilization Following Hospital Discharge: A Randomized...	BA
50	2015	Nivya, K...	Systemic review on drug related hospital admissions - A pubmed based search	BA
668	2015	Luder, H...	TransitionRx: Impact of community pharmacy postdischarge medication therapy management on hospital r...	OE
13	2015	Le, Q. A...	Issues associated with the economic evaluation entitled "a cost-effectiveness evaluation of hospital dischar...	
2	2015	Kansag...		He
665	2015	Jeong, ...	Analysis of 30-day postdischarge morbidity and readmission after radical gastrectomy for gastric carcinoma...	PD
662	2015	Hatipog...	Association Between Postdischarge Pulmonologist Visit and Hospital Readmission	
650	2015	Fonseca...	Hospital Admissions, Costs, and 30-Day Readmissions Among Newly Diagnosed Nonvalvular Atrial Fibrillati...	BA
660	2015	Flippo, ...	Reduction of 30-Day Preventable Pediatric Readmission Rates With Postdischarge Phone Calls Utilizing a Pa...	IN
14	2015	Chintha...	Author response to "issues associated with the economic evaluation entitled "a cost-effectiveness evaluatio...	
363	2015	Bishop, ...	Patients' and physicians' satisfaction with a pharmacist managed anticoagulation program in a family medi...	BA
372	2015	Balling, ...	Impact of a transition-of-care pharmacist during hospital discharge	OE
63	2015	Algham...	Admissions for drug-related problems at the Emergency Department of a University Hospital in the Kingdo...	BA

Showing 272 of 272 references.

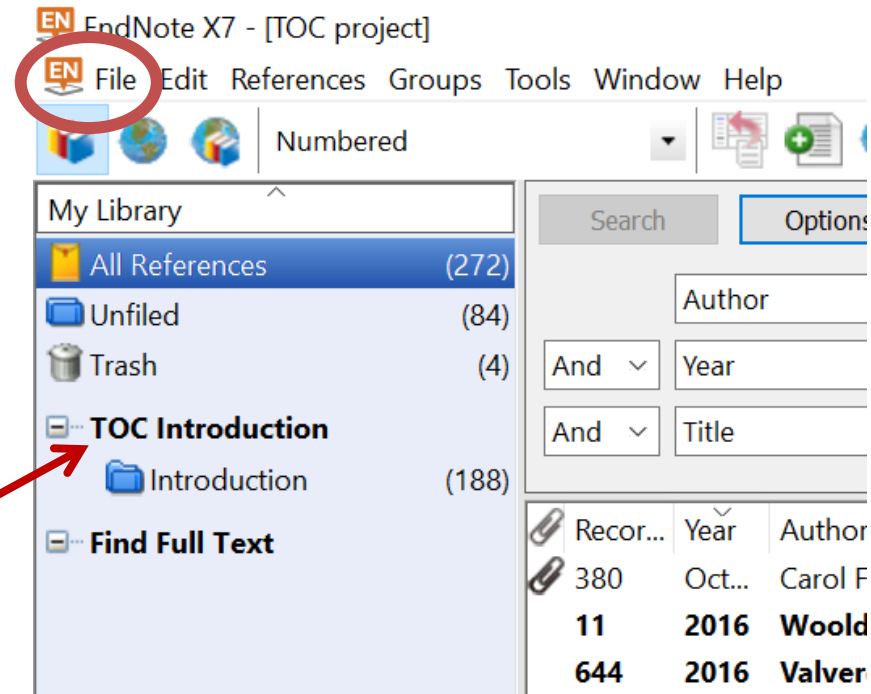
Layout

Reference Preview

1. Kansagara, D., et al., *So many options, where do we start? An overview of the care transitions literature*. J Hosp Med, 2016. **11** (3): p. 221-30.

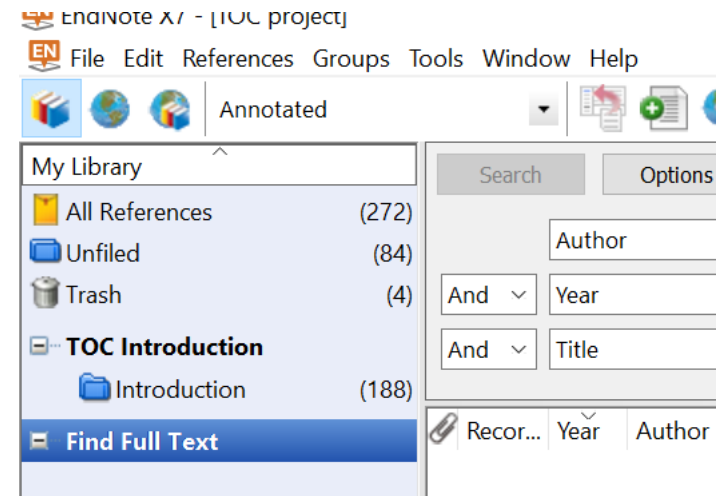
# Create a Local library

- File
  - New
    - Add name and save to the destination you want
- The created library will appear in Endnote under local library



# Groups Types

- Permanent groups
  - All references
  - Unfiled
  - Trash
  - Online Search groups
  - Find Full Text groups
- custom groups
- smart groups
- Duplicates references
- Copied references





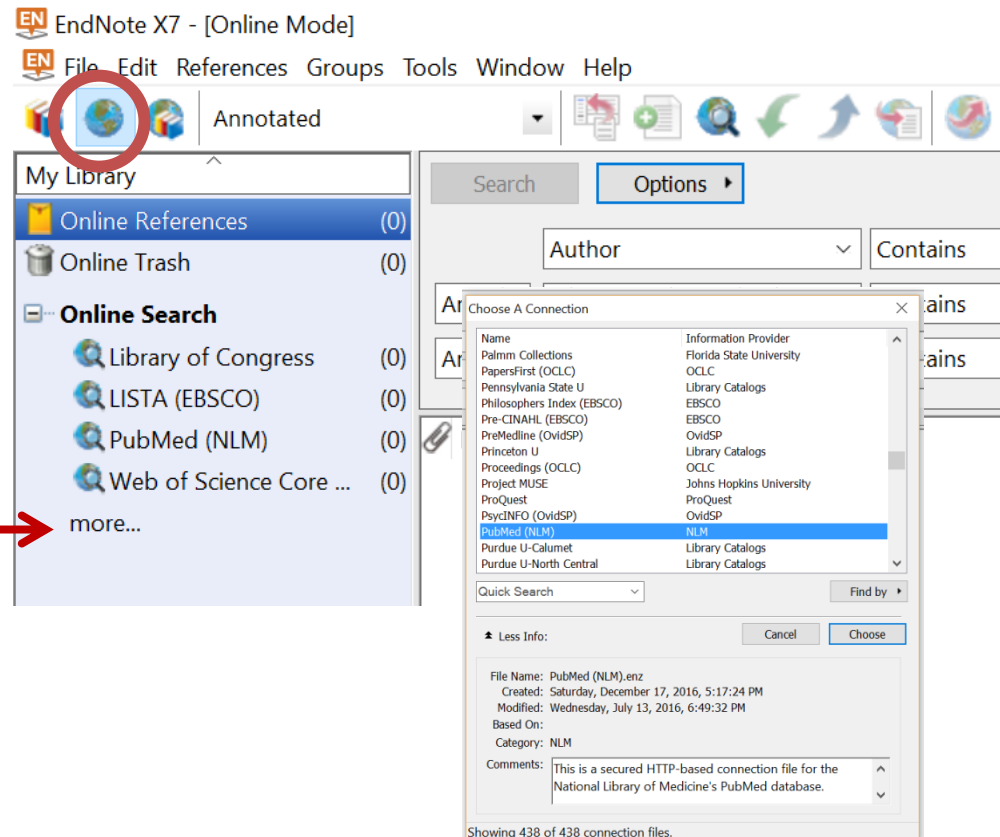
# Using Groups

- Help breakdown large library
- Start by creating a group
  - Types of groups
    - Main group
    - Smart group:
      - use search criteria to dynamically update groups as existing references are edited or new references are added to the library
  - Create from groups



# Online Search

- Needs internet connection
- Select the database for your search
  - You can add more databases
    - Click more
- Type in your keyword and hit search



EndNote X7 - [Online Mode]

File Edit References Groups Tools Window Help

Annotated

My Library

- Online References (0)
- Online Trash (0)
- Online Search**
  - Library of Congress (0)
  - LISTA (EBSCO) (0)
  - PubMed (NLM) (0)
  - Web of Science Core ... (0)

Search Options

Search Remote Library ☐ Match Case ☐ Match Words

Author (Smith, A.B.) Contains

And Year Contains

And Title Contains

All Fields

Author (Smith, A.B.)

PMID

Year

Recor...

Abstract

EndNote X7 - [Online Mode]

File Edit References Groups Tools Window Help

Annotated

My Library

- Online References (0)
- Online Trash (0)
- Online Search**
  - Library of Congress (0)
  - LISTA (EBSCO) (0)
  - PubMed (NLM) (0)
  - Web of Science Core ... (0)
  - more...

Search Options

Search Remote Library ☐ Match Case ☐ Match Words

Title Contains Transition of care

And Title Contains pharmacist

And Title Contains heart failure

Recor... Ye

Abstract

Searching...

Cancel

Confirm Online Search

Found 16 records.

Retrieve records from: 1 through 16

☐ Clear currently displayed results before retrieving records.

OK Cancel

Annotated

My Library

- Online References (16)
- Online Trash (0)
- Online Search
  - Library of Congress (0)
  - LISTA (EBSCO) (0)
  - PubMed (NLM) (16)
  - Web of Science Core ... (0)
  - more...

Search Options

Search Remote Library

Title Contains Transition

And Title Contains Pharmacist

Recor...	Year	Author	Title
1	2017	Huang, ...	Assessment of reimbursement in a community hospital-based pharmacist-managed outp...
14	2004	Crotty, ...	Does the addition of a pharmacist transition coordinator improve evidence-based medica...
16	1979	Whittet,...	Donald E. Francke Medal lecture. The transition from apothecary to pharmacist in British...
9	2014	Kirkham...	The effect of a collaborative pharmacist-hospital care transition program on the likelihoc...
4	2016	Cheen, ...	Evaluation of a care transition program with pharmacist-provided home-based medicatio...
2	2017	Cheen, ...	Evaluation of a care transition program with pharmacist-provided home-based medicatio...
5	2015	Balling, ...	Impact of a transition-of-care pharmacist during hospital discharge
11	2013	Chieng, ...	Improving the transition of highly complex patients into the community: impact of a pha...
15	1992	Shepher...	Making the transition from intern to pharmacist
7	2014	Noble, ...	Making the transition from pharmacy student to pharmacist: Australian interns' percepti...
12	2013	Davis, K...	Optimizing transition of care through the facilitation of a pharmacist-managed deep veir...
6	2014	Pinelli, ...	Pharmacist managed diabetes and cardiovascular risk reduction clinic in kidney transplan...
8	2014	Fera, T.; ...	Role of a care transition pharmacist in a primary care resource center
13	2010	Wood, ...	A time of transition: Thomas Mayleigh--pharmacist or physician?
3	2017	Stewart,...	Transition From Paper to Computerized Pharmacist Clinical Decision Support
10	2014	Kristelle...	Transition of care: pharmacist help needed

Showing 16 of 16 references in Group. (All References: 16)

## Reference Panel

- Read/Unread Status
- ✓ Author
- ✓ Year
- ✓ Title
- Journal/Secondary Title
- Date
- Rating
- ✓ Record Number
- Reference Type
- Secondary Author
- Place Published
- Publisher
- Volume
- Number of Volumes
- Number
- Pages
- Section
- Tertiary Author
- Tertiary Title
- Edition
- Type of Work
- Subsidiary Author
- Short Title
- Alternate Journal/Title
- ISBN/ISSN
- Original Publication
- Reprint Edition
- Reviewed Item
- ✓ Custom 1
- Custom 2
- Custom 3
- Custom 4



DFs

↑ ↓

s attached to this

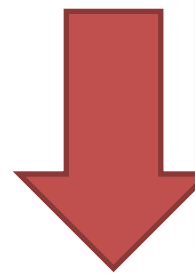
### Groups Panel

- ✓ Left
- Off

### Reference Panel

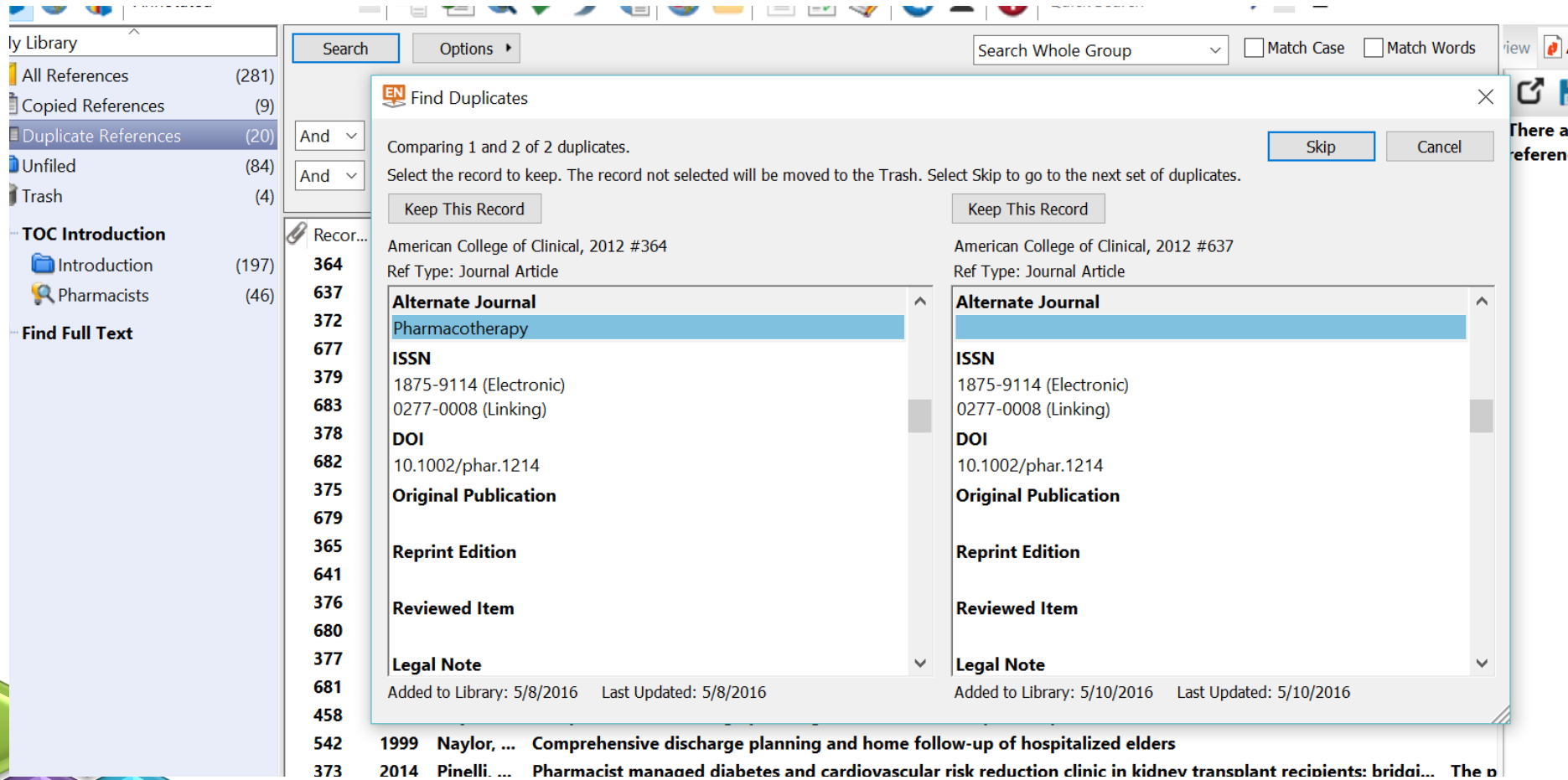
- ✓ Right
- Right - Split
- Bottom
- Bottom - Split
- Off

Layout



Layout

# Remove Duplicate



**Find Duplicates**

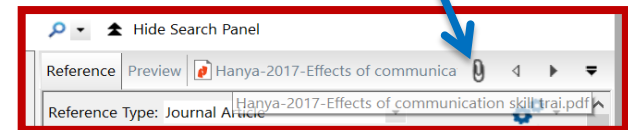
Comparing 1 and 2 of 2 duplicates.  
Select the record to keep. The record not selected will be moved to the Trash. Select Skip to go to the next set of duplicates.

Keep This Record	Keep This Record
American College of Clinical, 2012 #364	American College of Clinical, 2012 #637
Ref Type: Journal Article	Ref Type: Journal Article
<b>Alternate Journal</b>	<b>Alternate Journal</b>
Pharmacotherapy	
<b>ISSN</b>	<b>ISSN</b>
1875-9114 (Electronic)	1875-9114 (Electronic)
0277-0008 (Linking)	0277-0008 (Linking)
<b>DOI</b>	<b>DOI</b>
10.1002/phar.1214	10.1002/phar.1214
<b>Original Publication</b>	<b>Original Publication</b>
<b>Reprint Edition</b>	<b>Reprint Edition</b>
<b>Reviewed Item</b>	<b>Reviewed Item</b>
<b>Legal Note</b>	<b>Legal Note</b>
Added to Library: 5/8/2016 Last Updated: 5/8/2016	Added to Library: 5/10/2016 Last Updated: 5/10/2016

1999 Naylor, ... Comprehensive discharge planning and home follow-up of hospitalized elders  
2014 Pinelli, ... Pharmacist managed diabetes and cardiovascular risk reduction clinic in kidney transplant recipients: bridging the gap

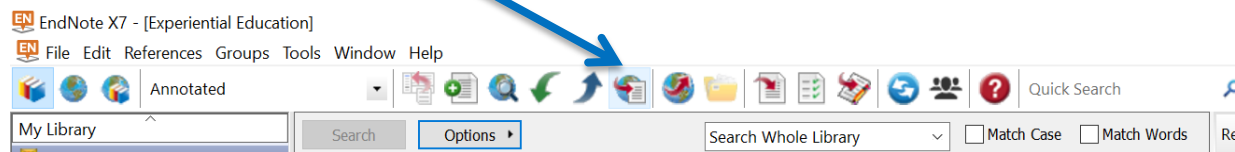
# Finding Fulltext

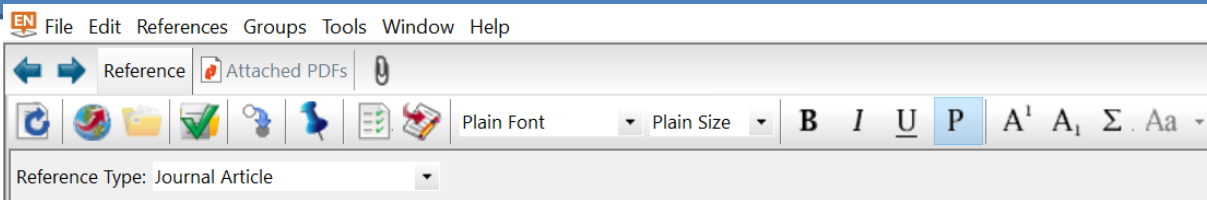
- Import to Endnote from your PC (paper clip icon)
- Or



- Go to file >>> import >>> choose single file or folder

- Automatic search from Endnote





**Rating**

EndNote X7 - [Experiential Education]

**Author**

Silvester

My Library

- All References (327)
- Unfiled (0)
- Trash (6)
- My Groups
  - EXP EDU (327)
- Find Full Text
  - Searching... (7)
  - Found PDF (2)
  - Found URL (3)
  - Not found (1)

Search

Options

Search Whole Library

Match Case

Match Words

Author

Contains

Year

Contains

Title

Contains

Recor...	Year	Author	Title
70	2017	Yamamur...	Effect of practical training on the learning motivation profile of Japanese pharmacy students
67	2017	Thomps...	Use of simulation training to prepare pharmacy residents for medical emergencies
65	2017	Silvester, ...	Adverse impact of pharmacy resident stress during training
94	2017	Schafhe...	Fitness for purpose of pharmacy technician education and training: The case of Gr
61	2017	Palisoc, ...	Relationship Between Grit with Academic Performance and Attainment of Postgra
68	2017	Okubo, ...	In Practical Training, a Questionnaire Survey and Analysis to Pharmacy Students o
90	2017	Myotok...	Enhanced Understanding of the Levels of Palliative Care in Pharmacy Students Thi
66	2017	Mutz, A...	Student Preparation for PGY1 Residency Training by US Colleges of Pharmacy: Sur
71	2017	Melo, D...	Training of pharmacy technicians for dispensing drugs in Primary Health Care
62	2017	Mafinej...	Training and Validation of Standardized Patients for Assessing Communication an
81	2017	Jee, S. D...	Using longitudinal mixed methods to study the development of professional beha
78	2017	Hohmei...	Training and retaining community pharmacy leaders: Career pathways after compl
64	2017	Hanya, ...	Effects of communication skill training (CST) based on SPIKES for insurance-cover
60	2017	Hammo...	Perceived Motivating Factors and Barriers for the Completion of Postgraduate Trai
69	2017	Echever...	Racial Dynamics and Cultural Competence Training in Medical and Pharmacy Educ
63	2017	Brown, ...	Evaluation of a Hybrid Training Module for Community Pharmacy Staff Providing
85	2016	Villarrea...	Training and certification in geriatric pharmacy

Hide Search Panel

Reference

Preview

Hanya-2017-Effects of communica

Reference Type: Journal Article

**Rating**

**Author**

Hammond, D. A.

Oyler, D. R.

Devlin, J. W.

Painter, J. T.

Bolesta, S.

Swanson, J. M.

Bailey, B. J.

Branan, T.

Barletta, J. F.

Dunn, B.

Haney, J. S.

Juang, P.

Kane-Gill, S. L.

Kiser, T. H.

Shafeeq, H.

Skaar, D.

Smithburger, P.

Taylor, J.

**Year**

2017

**Title**

Perceived Motivating Factors and Barriers for the Completion of Postgraduate Training Among American Pharmacy Students Prior to Beginning Advanced Pharmacy Practice Experiences

**Journal**

Am J Pharm Educ

Showing 327 of 327 references.

# Finding Fulltext

- Once citations were downloaded
  - Select the ones you want and copy to your database
  - Perform find fulltext
    - Found pdf
    - Found URL
    - Not found
- Endnote searches the first 2 pages of the pdf and metadata for DOI (digital Object identifier)
- Scanned pdf's, no DOI are not identifiable and not retrievable by endnote
  - You can annotate your pdf in Endnote (highlight, comments)





# Import References from PubMed

- Perform your search in PubMed
- Select the citations you want to import



The screenshot shows the PubMed website interface. On the left, there are filters for 'Article types' (Clinical Trial, Review, etc.), 'Text availability' (Abstract, Full text, etc.), 'Publication dates' (5 years, 10 years, etc.), and 'Species' (Humans, Other Animals). The main search results list three items, with the first two selected. A 'Send to' dialog box is open, showing options to 'Choose Destination' (File, Collections, Order, My Bibliography, Citation manager) and 'Generate a file for use with external citation management software'. A Firefox download dialog is also open, asking 'What should Firefox do with this file?' with options to 'Open with EndNote X7.7.1 (Bld 10036)', 'Save File', or 'Do this automatically for files like this from now on.' The background shows the search results for 'management services in Alberta community pharmacies' and 'The effect on potential adverse drug events of a pharmacist-acquired medication history in an emergency department...'.

The screenshot shows the EndNote software interface. On the left, there is a 'My Library' pane with options like 'All References (310)', 'Manuscript Title.docx (8)', 'Imported References (7)', 'Unfiled (91)', 'Trash (4)', 'TOC Introduction', 'All Ref (219)', 'New Group From G... (173)', 'Pharmacists (52)', 'Reviews (23)', and 'Find Full Text'. The main area displays a table of references with columns: 'Reor...', 'Year', 'Author', 'Title', 'Journal/Secondary Title', 'Abstract', and 'Cus'. Below the table, there is a search table with columns: 'Search', 'Options', 'Search Whole Group', 'Match Case', and 'Match'. The search table contains three rows of search criteria.

Search	Options	Search Whole Group	Match Case	Match
Title	Contains	Transition		
And Title	Contains	Heart failure		
And Title	Contains	guideline		

Reor...	Year	Author	Title	Journal/Secondary Title	Abstract	Cus
707	2015	Becerra-Cama...	The effect on pote...	BMC Health Serv Res	BACKGROUND: Pote...	
710	2014	Farris, K. B.; C...	Effect of a care tra...	BMC Health Serv Res	BACKGROUND: Phar...	
712	2014	Hohmann, C.; ...	Providing systema...	J Clin Pharm Ther	WHAT IS KNOWN A...	
706	2017	Houle, S. K.; C...	A randomized cont...	Res Social Adm Pharm	BACKGROUND: The ...	
708	2015	Martin, P.; Ta...	A consumer-target...	Trials	BACKGROUND: Medi...	
711	2014	Pourrat, X.; R...	Impact of drug rec...	Trials	BACKGROUND: Patie...	
709	2015	Shaya, F. T.; C...	Impact of a compr...	J Med Econ	OBJECTIVE: This pro...	



# Enter New Reference Manually

EndNote X7 - [TOC project]

File Edit **References** Groups Tools Window Help

- New Reference Ctrl+N
- Edit References Ctrl+E
- Move References to Trash Ctrl+D
- Go To... Ctrl+J
- Copy References To >
- E-mail Reference
- File Attachments >
- PDF Viewer >
- Find Full Text >
- Find Reference Updates...
- URL >
- Figure >
- Next Reference Ctrl+Page Down
- Previous Reference Ctrl+Page Up
- Show All References Ctrl+M
- Show Selected References
- Hide Selected References
- Record Summary...
- Find Duplicates
- Restore to Library
- Resolve Sync Conflicts...
- Empty Trash

EndNote X7 - [New Reference]

File Edit References Groups Tools Window Help

Reference Attached PDFs

Plain Font Plain Size B I U P A<sup>1</sup> A<sub>1</sub> Σ

Reference Type: Journal Article

Rating

Author

Year

Title

Journal

Volume

Issue

Pages

Start Page

Epub Date

Date

Type of Article

Encyclopedia

Equation

Figure

Film or Broadcast

Generic

Government Document

Grant

Hearing

Interview

Journal Article

Legal Rule or Regulation

Magazine Article

Manuscript

Map

Music

Newspaper Article

Online Database

Online Multimedia

Pamphlet

Patent

Personal Communication

Podcast

Press Release

Report

Serial

Standard

Statute

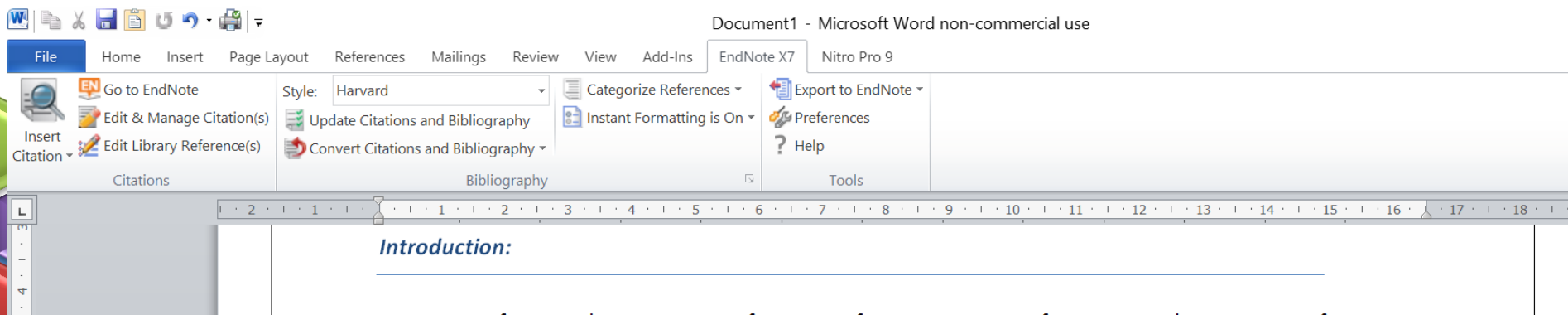
Thesis

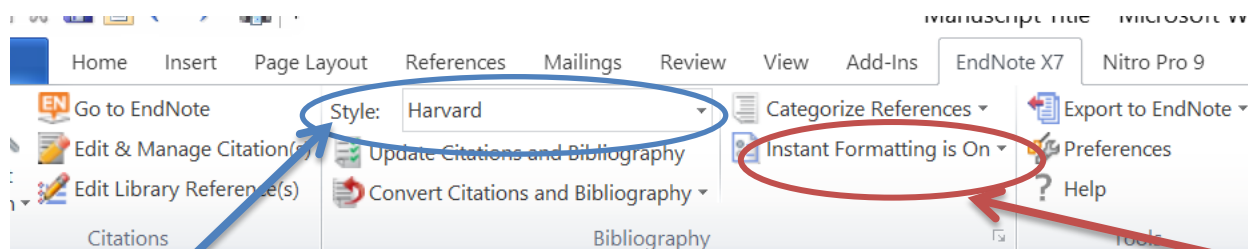
Unpublished Work

Web Page

# Cite while you write

- Open your Word document
- Enter reference
  - From Endnote
    - Open Word (go to word processor (Alt+1))
  - From Word
    - Open Endnote





Change  
references  
style from  
here

Make  
sure  
this is  
on

## Manuscript Title

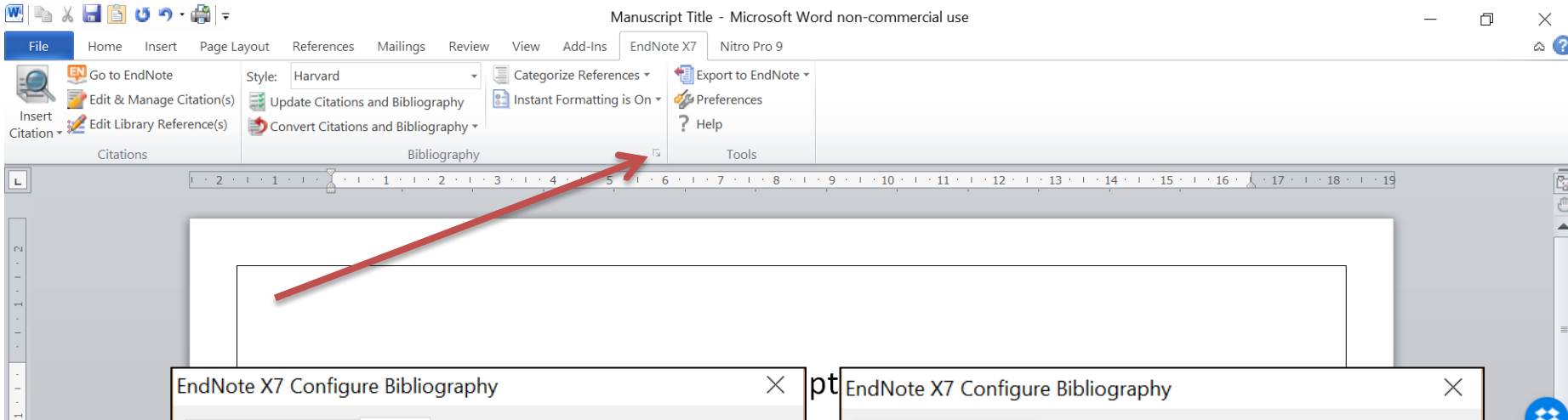
### Introduction:

Transition of care is the movement of a patient from one setting of care to another. Settings of care may include hospitals, ambulatory primary care practices, ambulatory specialty care practices, long-term care facilities, home health, and rehabilitation facilities (Jencks, 1995). Transitions increase the risk of adverse events due to the potential for miscommunication as responsibility is given to new parties. Hospital discharge is a complex process representing a time of significant vulnerability for patients. Safe and effective transfer of responsibility for a patient's medical care relies on effective provider communication with patient comprehension of discharge instructions. (Forster et al., 2003, Howard et al., 2008, Stausberg and Hasford, 2011)

### References List

- FORSTER, A. J., MURFF, H. J., PETERSON, J. F., GANDHI, T. K. & BATES, D. W. 2003. The incidence and severity of adverse events affecting patients after discharge from the hospital. *Ann Intern Med*, 138, 161-7.
- HOWARD, R., AVERY, A. & BISSELL, P. 2008. Causes of preventable drug-related hospital admissions: a qualitative study. *Qual Saf Health Care*, 17, 109-16.
- JENCKS, S. F. 1995. Measuring quality of care under Medicare and Medicaid. *Health Care Financ Rev*, 16, 39-54.
- STAUSBERG, J. & HASFORD, J. 2011. Drug-related admissions and hospital-acquired adverse drug events in Germany: a longitudinal analysis from 2003 to 2007 of ICD-10-coded routine data. *BMC Health Serv Res*, 11, 134.

# Configuring the bibliography



EndNote X7 Configure Bibliography

Format Bibliography | Layout

Font: Calibri Size: 11

Bibliography title: References List Text Format...

Start with bibliography number: 1

First line indent: 0.000 in Line spacing: Single

Hanging indent: 0.500 in Space after: None

OK Cancel Help

EndNote X7 Configure Bibliography

Format Bibliography | Layout

Format document: Manuscript Title.docx

With output style: Harvard Browse...

Temporary citation delimiters

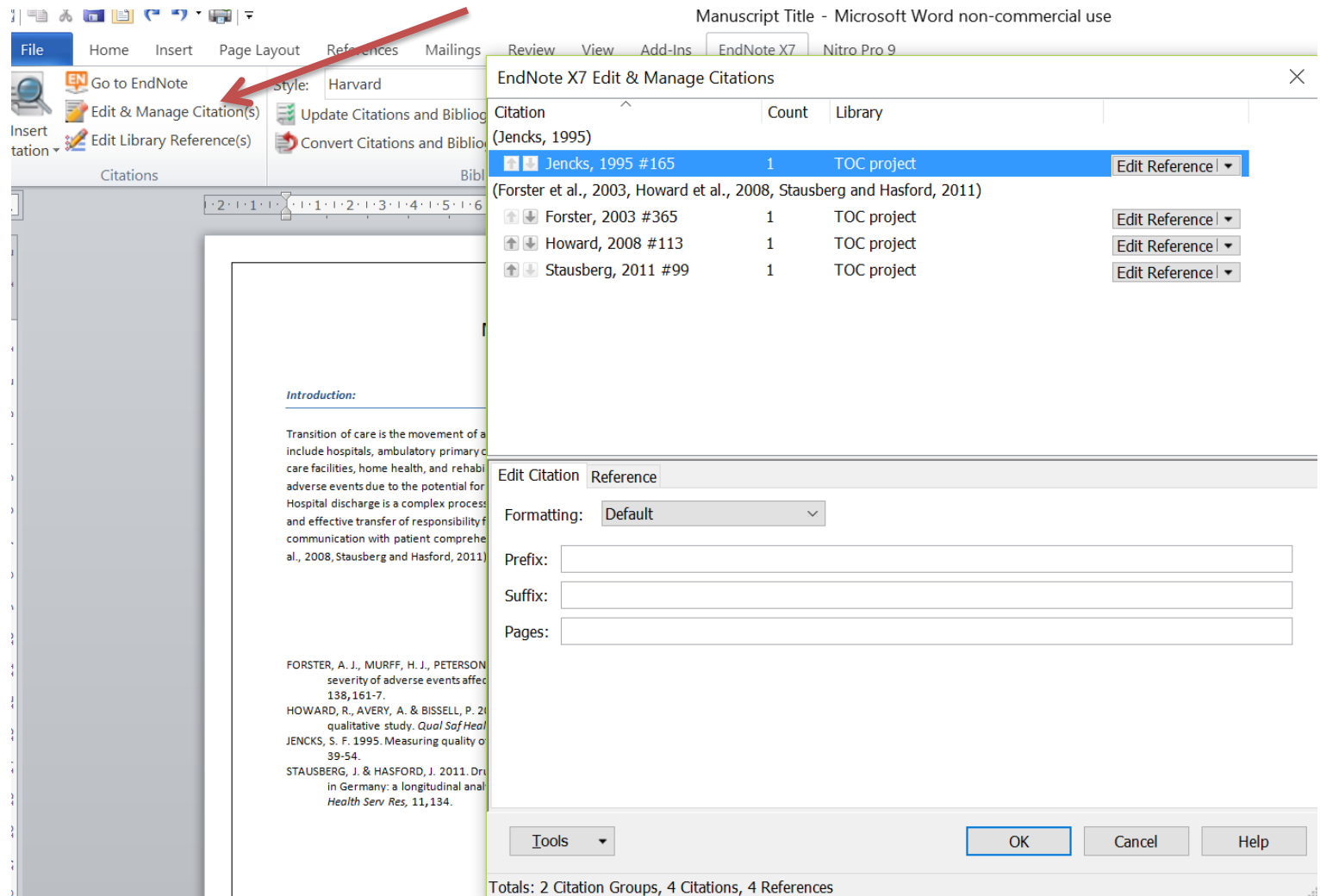
Left: { Right: }

☐ Link in-text citations to references in the bibliography

☐ Underline linked in-text citations

OK Cancel Help

# Manage & Edit citation



Manuscript Title - Microsoft Word non-commercial use

File Home Insert Page Layout References Mailings Review View Add-Ins EndNote X7 Nitro Pro 9

Style: Harvard

Go to EndNote

Edit & Manage Citation(s)

Edit Library Reference(s)

Update Citations and Bibliography

Convert Citations and Bibliography

Citations

Bibliography

EndNote X7 Edit & Manage Citations

Citation	Count	Library	
(Jencks, 1995)			
Jencks, 1995 #165	1	TOC project	Edit Reference
(Forster et al., 2003, Howard et al., 2008, Stausberg and Hasford, 2011)			
Forster, 2003 #365	1	TOC project	Edit Reference
Howard, 2008 #113	1	TOC project	Edit Reference
Stausberg, 2011 #99	1	TOC project	Edit Reference

Introduction:

Transition of care is the movement of a patient from one care facility to another. This process can include hospitals, ambulatory primary care facilities, home health, and rehabilitation facilities. The transition of care is a complex process and effective transfer of responsibility for the patient's care is essential for the patient's safety and well-being. This process is often complicated by communication with patient comprehensive care, 2008, Stausberg and Hasford, 2011).

FORSTER, A. J., MURFF, H. J., PETERSON, J. L. 2003. Severity of adverse events affects patient satisfaction. *Qual Saf Health Care*, 13, 161-7.

HOWARD, R., AVERY, A. & BISSELL, P. 2008. A qualitative study. *Qual Saf Health Care*, 18, 39-54.

JENCKS, S. F. 1995. Measuring quality of care. *Qual Saf Health Care*, 5, 39-54.

STAUSBERG, J. & HASFORD, J. 2011. Doctor-patient communication in Germany: a longitudinal analysis. *Health Serv Res*, 11, 134.

Format: Default

Prefix:

Suffix:

Pages:

Tools

OK Cancel Help

Totals: 2 Citation Groups, 4 Citations, 4 References

# Footnote in Endnote

## Categorize your references

Page Layout References Mailings Review View Add-Ins EndNote X7 Nitro Pro 9

Style: Harvard

Categorize References

Export to EndNote

Update Citations and Bibliography

Instant Formatting is On

Preferences

Convert Citations and Bibliography

Help

Bibliography

Tools

Manuscript Title

Introduction:

Transition of care is the movement of a patient from one setting of care to another. Settings of care may include hospitals, ambulatory primary care practices, ambulatory specialty care practices, long-term care facilities, home health, and rehabilitation facilities (Jendks, 1995). Transitions increase the risk of adverse events due to the potential for miscommunication as responsibility is given to new parties. Hospital discharge is a complex process representing a time of significant vulnerability for patients (Hilal, Dandao, et al., 2017, DiPiro et al., 2014). Safe and effective transfer of responsibility for a patient's medical care relies on effective provider communication with patient comprehension of discharge instructions (Polinski et al., 2016, Howard et al., 2008, Stausberg and Hasford, 2011, Dhalla et al., 2014)<sup>1</sup>

References List

Journals

DHALLA, I. A., O'BRIEN, T., MORRA, D., THORPE, K. E., WONG, B. M., MEHTA, R., FROST, D. W., ABRAMS, H., KO, F., VAN ROOYEN, P., BELL, C. M., GRUNER, A., LEWIS, G. H., DAUB, S., ANDERSON, G. M., HAWKER, G. A., ROCHON, P. A. & LAUPACIS, A. 2014. Effect of a postdischarge virtual ward on readmission or death for high-risk patients: a randomized clinical trial. *JAMA*, 312, 1305-12.

HOWARD, R., AVERY, A. & BISSELL, P. 2008. Causes of preventable drug-related hospital admissions: a qualitative study. *Qual Saf Health Care*, 17, 109-16.

JENCKS, S. F. 1995. Measuring quality of care under Medicare and Medicaid. *Health Care Financ Rev*, 16, 39-54.

LAUGALAND, K., AASE, K. & BARACH, P. 2012. Interventions to improve patient safety in transitional care - a review of the evidence. *Work*, 41.

POLINSKI, J. M., MOORE, J. M., KYRYCHENKO, P., GAGNON, M., MATLIN, O. S., FREDRICK, J. W., BRENNAN, T. A. & SHRANK, W. H. 2016. An Insurer's Care Transition Program Emphasizes Medication Reconciliation, Reduces Readmissions And Costs. *Health Aff (Millwood)*, 35, 1222-9.

STAUSBERG, J. & HASFORD, J. 2011. Drug-related admissions and hospital-acquired adverse drug events in Germany: a longitudinal analysis from 2003 to 2007 of ICD-10-coded routine data. *BMC Health Serv Res*, 11, 134.

Books


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